Re-Cap - First Annual Affiliate Member Conference

On June 29, close to 40 campus representatives joined 10 affiliate members for the first annual affiliate member conference.

Attendees enjoyed a variety of educational sessions, including several that qualified for continuing education credit for their professional licensing. In addition, there was a keynote lunch featuring Dr. George Mokrzan, Director of Economics for The Huntington Bank. Attendees were also able to connect one-on-one with affiliates in the vendor area. Finally, the day was capped with a reception sponsored by affiliate member Vorys, Sater, Seymour, and Pease.
Materials from the conference as well as additional pictures are available for download online.

Thank you to Ohio Dominican and Dr. Peter Cimbolic, president of the university, for hosting the event and thank you to all attendees and participating affiliates. The success of the event would not have been possible without you.

Eight 403(b) mistakes you can avoid

Mike Swallow
Executive Vice President, CBIZ Retirement Plan Services
Although the dust has settled on the last round of regulatory changes, compliance expectations in the 403(b) space are still a topic of discussion as organizations adapt to their new administrative duties and adjust their plan documents. The challenges faced by plan sponsors as they design, update and execute their plan documents are sometimes left undiscovered until they are identified under audit.

Here are some common stumbling blocks for sponsors: continue reading

MARKETING YOUR BUSINESS
(IT’S NOT ABOUT YOU)
Keith Flint
Strategy Director, Sudden Impact Marketing

Now that summer has arrived and we’re in a mindset for rebirth and renewal, take a fresh look at your content to ensure it speaks to your customer’s needs instead of your wants. And the best way to make that change is to understand that everyone will benefit from the shift.

The evidence is prolific. Late last year, articles on improved customer engagement appeared in what seemed to be a desperate, year-end push to alert marketers to their mistakes. Then, a high-profile Forrester report appeared that gave failing grades in customer engagement “effectiveness” to marketers of technology, software, investing, medical products, manufacturing, and services. It, combined with our own empirical observations, upholds one definitive observation: Companies talk too much about themselves, to the detriment of communication effectiveness....continue reading